

UNITED STATES DEPARTMENT OF AGRICULTURE

Farm Service Agency
Washington DC 20250

Notice AO-1288

For: FSA Offices

Using Queries for Year-End FY 2003 Work Measurement and Workload Automated Unit Counts

Approved by: Deputy Administrator, Management



1 Overview

A Background

Previously, BUD issued query and/or comparison notices for each workload cycle with a complete list of work items that provided the following:

- if the unit was counted by query, filled by KC-ITSDO or manual entry
- explanation for any manual counts for queried work items
- specific information about the work item
- what comparisons should be made with other work items
- information about making projections for subsequent FY.

This information was provided in notices to supplement instructions and exhibits in 12-AO. State and County Offices found it cumbersome to use several notices in addition to handbook text and exhibits to ensure that all information available for each work item was reviewed before completing workload reports.

Disposal Date	Distribution
March 1, 2004	All FSA Offices; State Offices relay to County Offices

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1 Overview (Continued)

B Purpose

This notice informs State and County Offices:

- that 12-AO (Rev. 19) has been amended to include information previously provided in the query/comparison notice for individual work items
- that County Software Release No. 521 and State Software Release No. 427, containing FY 2003 updated report and query software, will be mailed on **September 29, 2003**
- the query process must be run before installing County Release No. 522
- of action required for State and County Offices to complete and transmit FSA-55
- of State Office transmission deadline dates
- of instructions for work measurement County Offices.

C Contact

State Offices should direct questions about this notice to either of the following:

- Vicki Larson, BUD at 202-720-2501
- Elizabeth Hill, BUD at 202-720-9862.

2 Updates to 12-AO (Rev. 19) for Year-End Workload

A Updated State and County Office Requirements

In the past, State and County Offices have been unsure of requirements or responsibilities for preparation and training for workload reporting, reviewing reports, etc.

12-AO (Rev. 19), Amendment 6 has clarified State and County Office responsibilities in the following paragraphs:

- 9914 for monitoring the WM/WL Homepage
- 9918 for training employees in the County Office
- 9923 for State Office responsibilities before each workload cycle
- 9924 for State Office training requirements

Note: This paragraph does **not** require workload meetings be conducted as long as State Offices ensure that all County Offices are informed of the training information.

- 9925 for State Office review of County Office reports.

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2 Updates to 12-AO (Rev. 19) for Year-End Workload (Continued)

B New Format for Exhibit 13

In an effort to simplify the process of completing FSA-55-1 or FSA-55 reports, BUD is providing a new format for Exhibit 13. State and County Offices should refer to Exhibit 13 when completing each work item. In addition, the table in Exhibit 13 now contains the following information for each work item:

- whether the unit count is a query, query plus manual, query printout – query does not load, filled by KC-ITSDO, manual count
- title
- unit of measure and when unit is complete
- specific information about a work item
- activities that may or may not be included in a work item, especially applicable to workday or hour or manual unit counts
- comparison information that may be used in reviewing workload reports.

C New Format for Exhibit 17

Exhibit 17 has been amended to provide information for estimating for each work item. County Offices shall review instructions in Exhibit 17 before using the individual work item table.

Beginning with year-end 2003, a query printout will provide County Offices with a unit count of active contracts on September 30, 2003, for EQIP, CRP, and FSFL for work items 509, 528, and 1504. The County Office shall load the unit count provided on the printout in column 3 of FSA-55 for these work items.

3 County Office Action

A Processing Work Item Queries

Before processing the work item queries, County Offices shall:

- install County Software Release No. 521, which should be sent by overnight mail from KC-ITSDO on September 29, 2003
- ensure that all program data has been loaded in the system before running queries.

Notes: Manual unit counts will **not** be allowed for information not updated in the system except as allowed in Exhibit 13 for query-plus-manual work items.

Do not run the queries until October 1, 2003.

County Offices shall follow instructions in 12-AO (Rev. 19), paragraph 9952 to process the work item queries for all county files located on the system. Instructions in paragraph 9952 should be followed if error messages are received during the link-unlink process. County Offices shall do **all** of the following:

- use the official queries developed by the National Office

Note: Do **not** attempt to modify the queries.

- attach a copy of the query report to:
 - FSA-54 (4th quarter file copy for work measurement)
 - FSA-55 for workload
- have the query reports available for DD and COR reviews.

Note: Whether using the option to run all queries or each individual query, **each query should be run only once**, unless otherwise instructed by Budget Q&A.

Once the query process is complete, the unit counts for those work items will be automatically entered in column 2 of FSA-55. County Offices may print a preliminary FSA-55 to review the query work item units.

County Offices are reminded that an explanation of each query and associated files and records used to count units is provided in the Query Book posted on the WM/WL Homepage.

3 County Office Action (Continued)

B Adjusting Query Counts

Some query counts may require an adjustment for a manual count because certain activities are not captured by the query. Previously, an exhibit was attached to the query notice that provided County Offices with a form to request these manual adjustments. BUD has developed a fillable Workload Query Adjustment Worksheet and posted it on the WM/WL Homepage under the “Queries” option.

County Offices shall do the following to complete the worksheet when adjustments are needed for a query count:

- access the WM/WL Homepage according to 12-AO (Rev. 19), paragraph 9914
- select State and county from the drop-down box

Note: Only reporting offices shall prepare a Workload Query Adjustment Worksheet that will include total query and manual counts for all counties included in the reporting office’s report.

- enter the **original query** unit count displayed on FSA-55, if applicable
- enter the **manual count** to be added to the original query, if applicable

Note: The worksheet will automatically compute the revised total.

- enter the appropriate explanation for why a manual count is required

Note: “Manual Count” or “Query is wrong” are not acceptable explanations and adjustments to the query will **not** be made when used.

- save document to a folder
- when all adjustments have been made and verified, e-mail the completed worksheet to the designated State Office contact person.

Note: See Exhibit 1 for an example of a completed worksheet.

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3 County Office Action (Continued)

B Adjusting Query Counts (Continued)

When County Offices do not agree with query counts, for work items other than those listed on the Query Adjustment Worksheet, a memorandum must be prepared and sent through the State Office to headquarters for the National Review. The memorandum must contain the following information:

- State and county code
- original query unit count
- additional manual count being requested
- revised total unit count
- attached documentation to justify the revised unit count.

C Merging Combined County Office Reports

County Offices that have a combined County Office situation where a closed or part-time office is part of the combination, shall follow the instructions in 12-AO (Rev. 19), paragraph 9950 to create a data tape for the closed or part-time office workload files. The headquarters County Office shall follow the instructions in 12-AO (Rev. 19), paragraph 9951 to load the data tape and generate a combined report.

County Offices that have a CMA file located on their AS400 shall follow the instructions in 12-AO (Rev. 19), paragraphs 9950 and 9951 to merge the files into one report.

D Adding or Modifying Entries on FSA-55

County Offices shall follow instructions in 12-AO (Rev. 19), paragraph 9943 and/or 9944 to enter or revise manual unit counts and estimates on FSA-55. Command 11 shall be completed following updates to the report to save updated entries.

Note: This part of the workload process must be completed on a 3180 or 3197 terminal.

E Printing and Reviewing Reports

County Offices should ensure that work item unit counts were completed according to information provided in 12-AO (Rev. 19), Exhibits 13 and 17 and by the State Office Workload Specialist. County Offices should follow instructions in 12-AO (Rev. 19), paragraphs:

- 9946 to print the completed report
- 9947 to perform the preliminary validation process.

3 County Office Action (Continued)

E Printing and Reviewing Reports (Continued)

If a Data Exception and Rejection Report prints, the County Office shall do either of the following:

- correct the unit count if entry was in error
- provide justification and documentation to the State Office for any work item that will not be adjusted.

Note: An exception on the report will **not** prevent the transmission of the report.

F Transmitting County Office Reports to State Office

County Offices shall follow instructions in 12-AO (Rev. 19), paragraph 9948 to queue FSA-55 for transmission by date provided by the State Office. Only headquarters and full-time sub-offices should queue the FSA-55 report.

It is **extremely important** that County Offices verify on the next start-of-day after FSA-55 is queued to ensure that the XXxxxCF1 (XX = State abbreviation, xxx = county code) file successfully bundled and is listed on the outgoing transmission file. Report transmission problems to State Offices for assistance.

G FLP Guidelines

Only Type 1 County Offices shall report Farm Loan Program activity. County Offices may review Notice FLP-305 issued April 24, 2003, to ensure that the appropriate MAC data fields and WLS codes have been updated in the system before processing the workload queries. **However, 12-AO (Rev. 19), Exhibit 13 should be consulted for the updated information on whether work items are a query or manual count or whether query may require a manual count.** WLS not completed is not a valid explanation for adjusting query counts. Ensure that activity (appraisals, etc.) completed by State Office employees for the County Office is entered in WLS timely to be captured by query and not forwarded by memorandum for entry during the National Review.

H Instructions for Work Measurement

Work measurement County Offices are reminded that only workload queries will be sent out in the software release. KC-ITSDO will delete all entries from first through third quarter work measurement reports **for any work item that has a query**. The query unit count plus any applicable manual count for the entire FY shall be entered in the fourth quarter FSA-54 report.

4 State Office Action

A State Office Responsibilities

State Offices shall review 12-AO (Rev. 19), paragraph 9923 before September 30, 2003, to ensure that all State Office responsibilities are being fulfilled. 12-AO (Rev. 19), paragraph 9924 provides training requirements and training information that should be provided to County Offices before workload reporting.

The State Office Workload Specialist shall ensure that 12-AO (Rev. 19), Amendment 6 has been distributed to County Offices and have advised that it should be incorporated into the handbook before preparing workload reports. Transmission dates and meeting dates, if applicable, should be provided to County Offices timely so County Offices have adequate time to prepare and review FSA-55.

State Software Release No. 427 must be installed for County Offices to successfully transmit FSA-55 reports to the State Office. The software has a built in purge of prior year workload data. However, the State Office may complete the annual purge, option 9 on the Workload Menu before installing the software to expedite the installation process.

B Monitoring WM/WL Homepage

It is imperative that State and County Offices are informed of the information posted on the WM/WL Homepage during the workload reporting period. Although both State and County Offices have access to the homepage, it is the State Office Workload Specialist's responsibility to ensure that all County Offices are advised of the information timely.

C Verifying Receipt of County Office Transmissions

Before reviewing FSA-55 and transmitting to KC-ITSDO, State Offices shall follow instructions in 12-AO (Rev. 19), paragraph 9969 to ensure that all County Office transmissions have been received.

4 State Office Action (Continued)

D Reviewing and Adjusting Reports

The State Office Workload Specialist shall ensure that County Office data has been reviewed before submission for the National Review, according to instructions in 12-AO (Rev. 19), paragraph 9925. When completing the review, it is important that both actual and estimated unit counts should be reviewed for accuracy. This review should include other Program Specialists and/or DD's. In addition to the comparison report options provided in 12-AO (Rev.19), paragraphs 9967 and 9968, supplemental queries and instructions have been developed with information and instructions posted on the WM/WL Homepage. State Offices should review the information to determine which queries may supplant the menu driven comparison reports.

If during the review process it is determined that adjustments are required to County Office entries, State Offices shall inform County Offices of changes to their reports. County Offices shall be given the option to provide justification to State Offices for questionable entries. State Offices shall keep justification with the workload report for possible use during the National Review.

E Transmission Deadline Date

All State Offices shall transmit reports to KC-ITSDO **on or before Thursday, October 23, 2003**. It will be necessary for the Workload Specialist and IT staff to coordinate the queuing and end-of-day process on the day of transmission. Follow up during the next start-of-day to ensure successful bundling and transmission of the XX000CF3 file (XX = State abbreviation).

Verify successful transmission by printing an Outgoing Detail History Report by taking option 4 through the telecommunication functions. Repeatedly queuing the workload report will **not** solve a missing transmission problem if there is an unknown system problem.

4 State Office Action (Continued)

F Forwarding County Office Information to Headquarters

Previously, an exhibit was attached to the AO notice that provided a format for County Offices to request adjustments to the work item queries. For FY 2003 year-end workload reporting, a fillable query adjustment form has been provided on the WM/WL Homepage for that purpose. The State Office shall provide County Offices with a State Office contact person to forward County Office e-mail reports. **The State Office shall not forward by e-mail to the National Office.** The query adjustment worksheets and all other memorandums and supporting documentation for County Office reports shall be forwarded to headquarters for the National Review. State Office shall forward to BUD by FedEx to the following address by **October 28, 2003**.

USDA/Farm Service Agency
Attn: Vicki Larson Room 4720
1400 Independence Ave. SW
Washington, DC 20250-0500



Farm Service Agency
County Office Workload

Query Adjustment Worksheet

Maryland - Queen Anne's, 24035

Work Item	Original Query	Manual Count	Revised Total	Explanation (70 characters max)
303	52	135	187	FSA-211 Power of attorney forms
351	67	25	92	CCC-452 for crop year 2001 and 2002
560	11	2	13	FSA-850 for Farm Programs
561	9	3	12	FSA-851 for Farm Programs
1202	33	4	37	FSA-364, Application for Transfer of Acreage Due to Disaster completed
1206	42	10	52	Disaster leases completed after rollover
1401	3,522	145	3,667	Crop year 2002 late-filed acreage reported in FY 2003